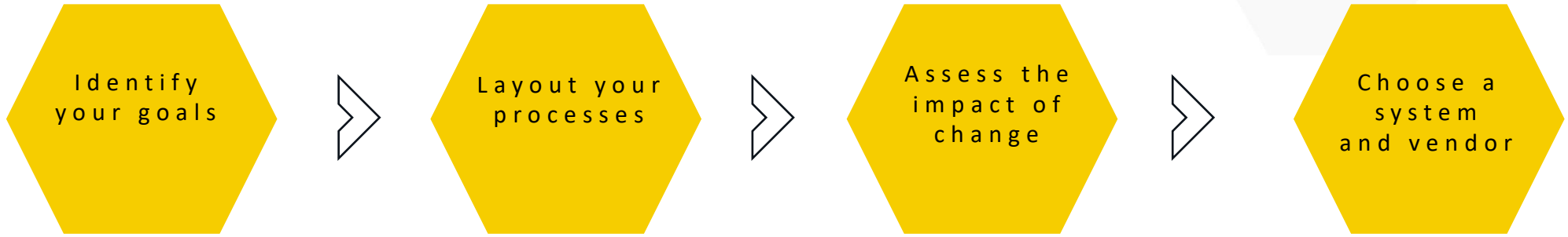
Karla Wentworth, Marketing Operations Hive Expert, B2B Marketing
October 2021

# Choosing a CRM




| | Identify your goals | Layout your processes | Assess the impact of change | Choose a system and vendor |
|---|---|---|---|---|
| Key questions: | • What is most important to you as a business in priority order?<br>• Track Leads and Lead Activity<br>• Track Customer Base<br>• Track Opportunities and Closing Rates<br>• Offer Connectivity Between Teams<br>• Manage Relationships<br>• Generate Customized Reporting<br>• Organize Business Operations<br>• Increase Profitability<br>• Increase Productivity | • Have you documented your buyers' journey?<br>• Have you document all internal processes which will be involved or affected?<br>• Do you know all your reporting requirements?<br>• Do you know your budget and total cost of ownership? | • Who is going to use the system?<br>• Sales, marketing, the whole company?<br>• Do you have the change management skills?<br>• Are there internally qualified colleagues?<br>• Do you need consultant support?<br>• Review compatibility with your existing tech stack<br>• Do you need integrations? | • Have you had in depth demos from a variety of CRM solutions?<br>• Are you or are they prepared for adoption and training?<br>• How much support will you need or receive from your chosen CRM supplier?<br>• Do you need a tech partner or consultant? |
| Key stakeholders: | • Marketing leadership team<br>• Internal partners (BU GMs, Sales, etc.) | • Marketing leadership team<br>• CRM project team | • Marketing leadership team<br>• CRM project team<br>• Key stake holders (Sales, marketing etc.) | • Marketing leadership team<br>• CRM project team<br>• System end users |

PROPOLIS

To learn how to implement this model into your Marketing Strategy, contact our Customer Success Team here

PRODUCED BY B2B Marketing